

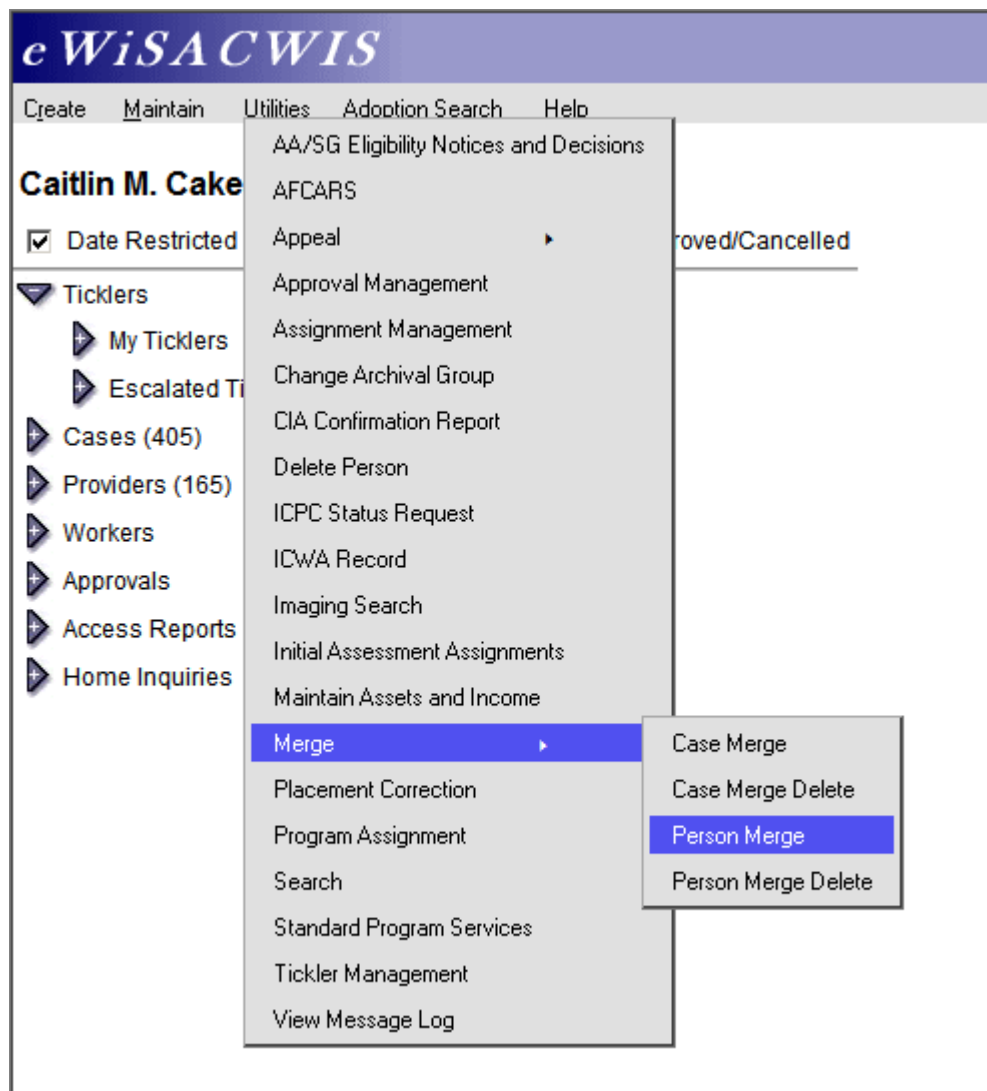
Person Merge

Note: In order to perform a person merge, an assignment to the case or provider is not needed.

Person Merge will incorporate two distinct person merge features. The first feature is the Manual Merge process. This process will require the user to identify potential duplicates and merge them together manually. The second process, the system will identify potential matches via the Case Maintenance page. Potential duplicate people will be identified with a ‘?’ next to the participants name. The user will be directed to the merge page with possible potential duplicates identified.

Manual Merge

1. From the desktop, go to Utilities > Merge > and select Person Merge.



2. The Potential Duplicate Person page will open. Use the Search hyperlink in the 'Keep Person' group box to identify the person record that is to be retained. (See the Search User Guide on proper techniques for searching.)
3. The 'Keep Person' group box will pre-fill with the identified person's (keep person) demographic information. The Search hyperlink is still enabled in case the wrong person ID record was selected in error and a new person needs to be searched.
4. In the Potential Removal Person(s) group box, select the 'Manual Search' hyperlink to search out the person record that is to be merged and removed.

Potential Duplicate Person - Windows Internet Explorer

eWiSACWIS Errors Print Spell Check Help

Keep Person

Person ID: 20998 SSN: 999-99-9999
 Name: Art J Abby [Search](#) Gender: Male
 Address: 111 Penntwon Rd DOB: 11/11/1961
 City: Baraboo State: WI Zip: 53913
 Country:

Potential Removal Person(s)

Remove	Name	Person ID	Date Created	Match Criteria	Not a Potential Match

[Manual Search](#)

[Save](#) [Close](#)

Done Local intranet | Protected Mode: Off 100%

5. The duplicate person ID record will pre-fill into the Potential Removal Person(s) group box. The 'Remove' check box will become enabled and checked. Mark sure the check box is checked in order to merge the records. The duplicate person's name will be a hyperlink to the person management record. The 'Keep' hyperlink will remove the current 'Keep Person' record and move the Potential Removal Person record up to the 'Keep Person' position. (This would be used if it was determined that the Potential Removed Person should be the Keep Person).

Potential Duplicate Person - Windows Internet Explorer

eWiSACWIS Print Spell Check Help

Keep Person

Person ID: 20998 SSN: 999-99-9999
Name: Art J Abby [Search](#) Gender:
Address: 111 Penntwon Rd DOB: 11/11/1961
City: Baraboo State: WI Zip: 53913
Country:

Potential Removal Person(s)

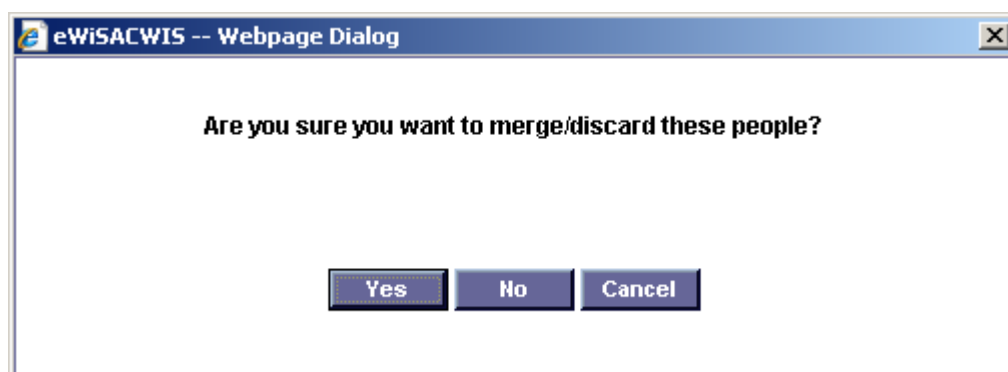
Remove	Name	Person ID	Date Created	Match Criteria	Not a Potential Match	
<input checked="" type="checkbox"/>	Art Abby	9221485	07/14/2004		<input type="checkbox"/>	Keep

[Manual Search](#)



Save Close

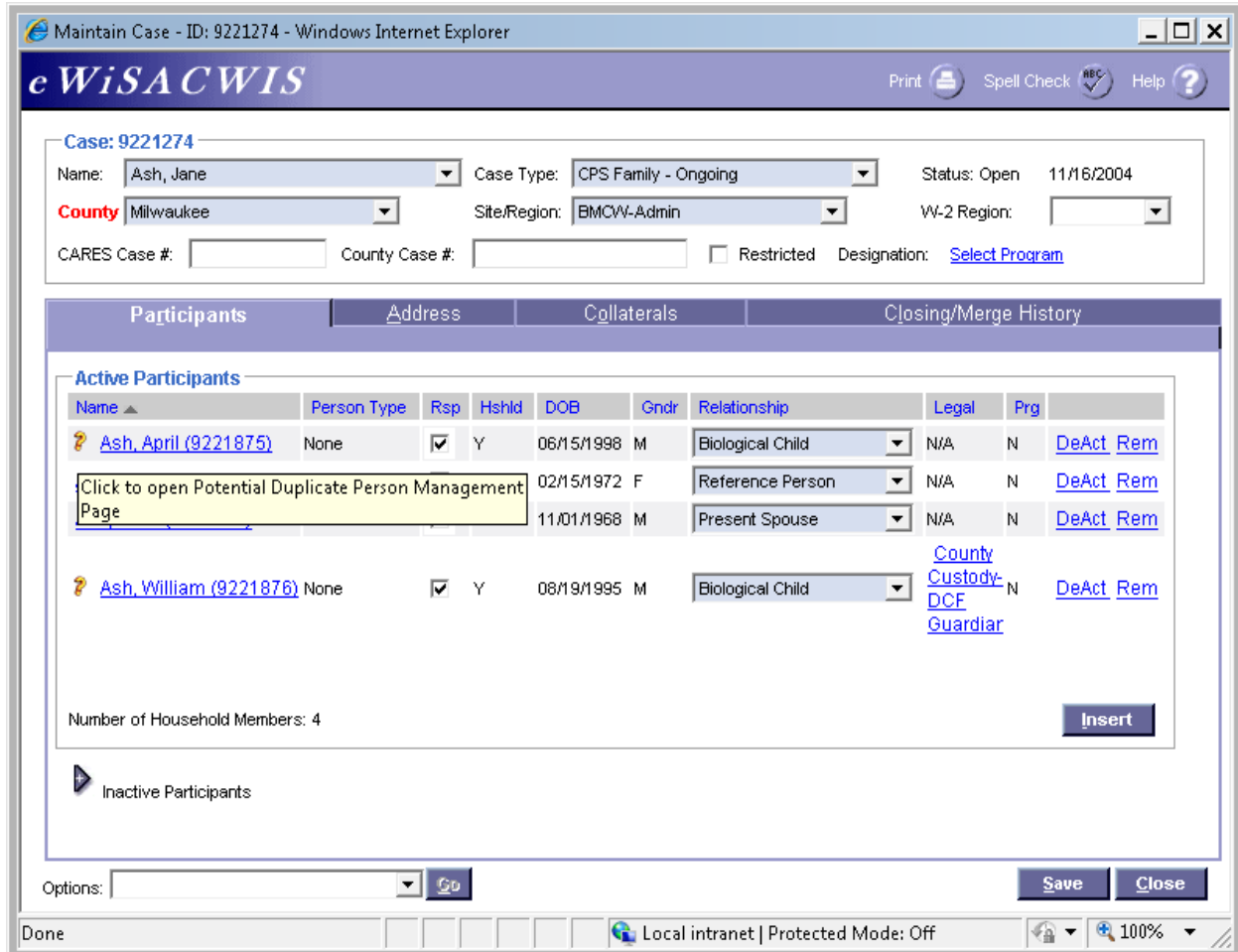
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6. Click the 'Save' button. A pop up message will appear asking if you would like to merge the records. Select Yes. This will merge the records through over night batch processing.



Merge – Maintain Case

1. There is a nightly batch that is run to identify potential duplicate person records in eWiSACWIS. When a potential duplicate is identified, eWiSACWIS will display a  on the Maintain Case page next to the name of the case participant who was identified as a potential duplicate person. Click the  icon to open the Potential Duplicate Person page.



Case: 9221274



Name: Case Type: Status: Open 11/16/2004

County: Site/Region: W-2 Region:

CARES Case #: County Case #: ☐ Restricted Designation: [Select Program](#)

Participants | Address | Collaterals | Closing/Merge History

Active Participants

Name	Person Type	Rsp	Hshld	DOB	Gndr	Relationship	Legal	Prg	
 Ash, April (9221875)	None	<input checked="" type="checkbox"/>	Y	06/15/1998	M	<input type="text" value="Biological Child"/>	N/A	N	DeAct Rem
Click to open Potential Duplicate Person Management Page									
				02/15/1972	F	<input type="text" value="Reference Person"/>	N/A	N	DeAct Rem
				11/01/1968	M	<input type="text" value="Present Spouse"/>	N/A	N	DeAct Rem
 Ash, William (9221876)	None	<input checked="" type="checkbox"/>	Y	08/19/1995	M	<input type="text" value="Biological Child"/>	N/A	N	DeAct Rem

County Custody- DCF Guardian

Number of Household Members: 4 [Insert](#)

[Inactive Participants](#)

Options: [Go](#) [Save](#) [Close](#)

Done Local intranet | Protected Mode: Off 100%

2. The Potential Duplicate Person page will display with the selected case participant identified as the 'Keep Person' with the associated potential duplicate persons displayed in the Potential Removal Person(s) group box allowing the user to quickly proceed with the person merge request.
3. If you decide that the 'Keep Person' is not the correct participant, use the 'Search' hyperlink, next to the 'Keep Person' name to search out the appropriate participant to keep.

Potential Duplicate Person -- Webpage Dialog

eWiSACWIS
Print
Spell Check
Help

Keep Person
Person ID: 9221875 SSN: 123-45-6789
Name: April Ash [Search](#) Gender: Male
Address: 17 S Fairchild DOB: 06/15/1998
City: Madison State: WI Zip: 53703
Country:

Potential Removal Person(s)

Remove	Name	Person ID	Date Created	Match Criteria	Not a Potential Match	
<input type="checkbox"/>	April Ash	20839	07/28/2000	Exact match on SSN	<input type="checkbox"/>	Keep
<input type="checkbox"/>	Maddie M. Mooretest	9221584	09/09/2004	Exact match on SSN	<input type="checkbox"/>	Keep
<input type="checkbox"/>	Child Pepper	9221536	08/16/2004	Exact match on SSN	<input type="checkbox"/>	Keep
<input type="checkbox"/>	Girl Miatest	9221506	08/06/2004	Exact match on SSN	<input type="checkbox"/>	Keep

[Manual Search](#)

Save
Close

4. The case participant will have the potential duplicate person icon display if he or she matches with another person (Potential Removal Persons) in the system on one of the following criteria:
 - Exact match on social security number
 - Exact match on date of birth and last name, and the sounds like matches the first name.
 - Exact match on last name and first name, and exact match on any two of the three numbers of the birthday, month day and year.
 - Exact match on one last name to another person's first name and first name to last and exact match on any two of the three numbers of the birthday, month day, and year.
5. The 'Remove' checkbox to the left of the potential removal person should be checked if this is identified as a duplicate to the 'Keep Person.' The Potential Removal Person is a hyperlink. Use the hyperlink to identify demographic information for this potential duplicate.

The 'Keep' hyperlink on the same line will move the Potential Removal Person up to the 'Keep Person' group box.

The 'Manual Search' hyperlink will allow you to search the system for other potential matches that have not been system identified.

6. When all Potential Removal Persons have been identified, click 'Save.'

Potential Duplicate Person -- Webpage Dialog

eWiSACWIS Print Spell Check Help

Keep Person

Person ID: 9221875 SSN: 123-45-6789
 Name: April Ash [Search](#) Gender: Male
 Address: 17 S Fairchild DOB: 06/15/1998
 City: Madison State: WI Zip: 53703
 Country:

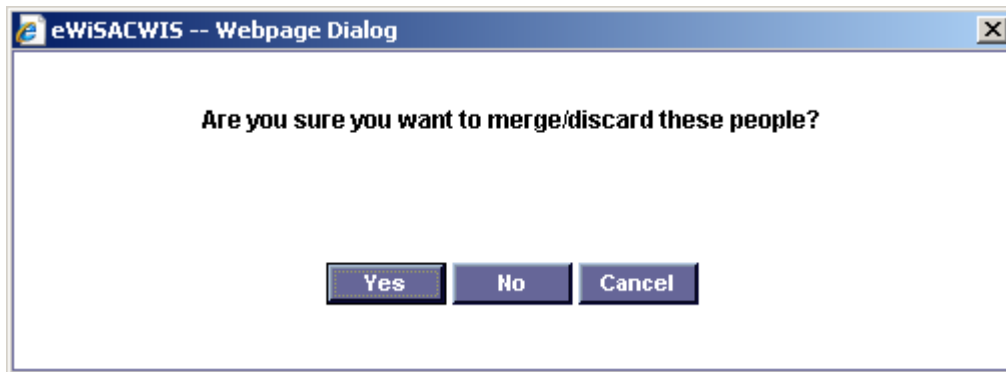
Potential Removal Person(s)

Remove	Name	Person ID	Date Created	Match Criteria	Not a Potential Match	
<input checked="" type="checkbox"/>	April Ash	20839	07/28/2000	Exact match on SSN	<input type="checkbox"/>	Keep
<input type="checkbox"/>	Maddie M. Mooretest	9221584	09/09/2004	Exact match on SSN	<input type="checkbox"/>	Keep
<input checked="" type="checkbox"/>	Child Pepper	9221536	08/16/2004	Exact match on SSN	<input type="checkbox"/>	Keep
<input type="checkbox"/>	Girl Miatest	9221506	08/06/2004	Exact match on SSN	<input type="checkbox"/>	Keep

[Manual Search](#)



Save Close

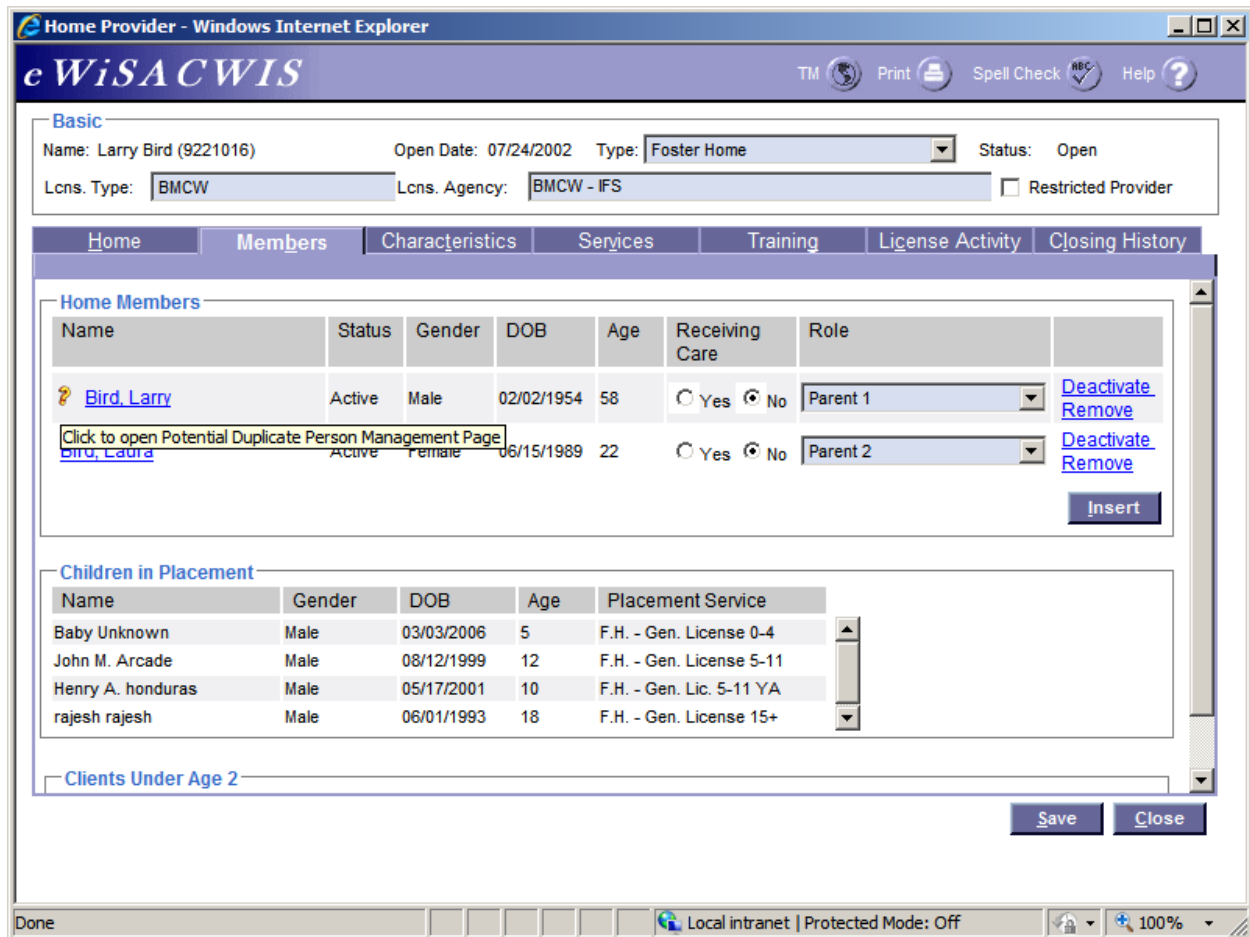
7. The following message will appear. Select 'Yes' to merge.



8. Click the Close button on the 'Potential Duplicate Person' page to return to the 'Maintain Case' page.

Merge – Home Provider

1. There is a nightly batch that is run to identify potential duplicate person records in eWiSACWIS. When a potential duplicate is identified, eWiSACWIS will display a  on the Home Provider page (Members tab) next to the name of the home member who was identified as a potential duplicate person. Click the  icon to open the Potential Duplicate Person page.



Home Provider - Windows Internet Explorer


eWiSACWIS TM Print Spell Check Help

Basic

Name: Larry Bird (9221016) Open Date: 07/24/2002 Type: Foster Home Status: Open

Lcns. Type: BMCW Lcns. Agency: BMCW - IFS ☐ Restricted Provider

Home Members

Name	Status	Gender	DOB	Age	Receiving Care	Role	
 Bird, Larry	Active	Male	02/02/1954	58	<input type="radio"/> Yes <input checked="" type="radio"/> No	Parent 1	Deactivate Remove
Click to open Potential Duplicate Person Management Page							
Bird, Laura	Active	Female	06/15/1989	22	<input type="radio"/> Yes <input checked="" type="radio"/> No	Parent 2	Deactivate Remove

[Insert](#)

Children in Placement

Name	Gender	DOB	Age	Placement Service
Baby Unknown	Male	03/03/2006	5	F.H. - Gen. License 0-4
John M. Arcade	Male	08/12/1999	12	F.H. - Gen. License 5-11
Henry A. honduras	Male	05/17/2001	10	F.H. - Gen. Lic. 5-11 YA
rajesh rajesh	Male	06/01/1993	18	F.H. - Gen. License 15+

[Clients Under Age 2](#)

[Save](#) [Close](#)

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2. The Potential Duplicate Person page will display with the selected provider member identified as the 'Keep Person' with the associated potential duplicate persons displayed in the Potential Removal Person(s) group box allowing the user to quickly proceed with the person merge request. If you decide that the 'Keep Person' is not the correct participant, use the 'Search' hyperlink, next to the 'Keep Person' name to search out the appropriate participant to keep.
3. The provider member will have the potential duplicate person icon display if he or she matches with another person (Potential Removal Persons) in the system on one of the following criteria:
 - Exact match on social security number
 - Exact match on date of birth and last name, and the sounds like matches the first name.
 - Exact match on last name and first name, and exact match on any two of the three numbers of the birthday, month day and year.
 - Exact match on one last name to another person's first name and first name to last and exact match on any two of the three numbers of the birthday, month day, and year.
4. The 'Remove' checkbox to the left of the potential removal person should be checked if this is identified as a duplicate to the 'Keep Person.' The Potential Removal Person is a hyperlink. Use the hyperlink to identify demographic information for this potential duplicate.

The 'Keep' hyperlink on the same line will move the Potential Removal Person up to the 'Keep Person' group box.

The 'Manual Search' hyperlink will allow you to search the system for other potential matches that have not been system identified.

5. When all Potential Removal Persons have been identified, click 'Save.'

Potential Duplicate Person -- Webpage Dialog

eWiSACWIS Print Spell Check Help

Keep Person

Person ID: 9221086 SSN: 111-11-1111
 Name: Larry Bird [Search](#) Gender: Male
 Address: 123 State Street DOB: 02/02/1954
 City: Madison State: WI Zip: 53701
 Country: United States

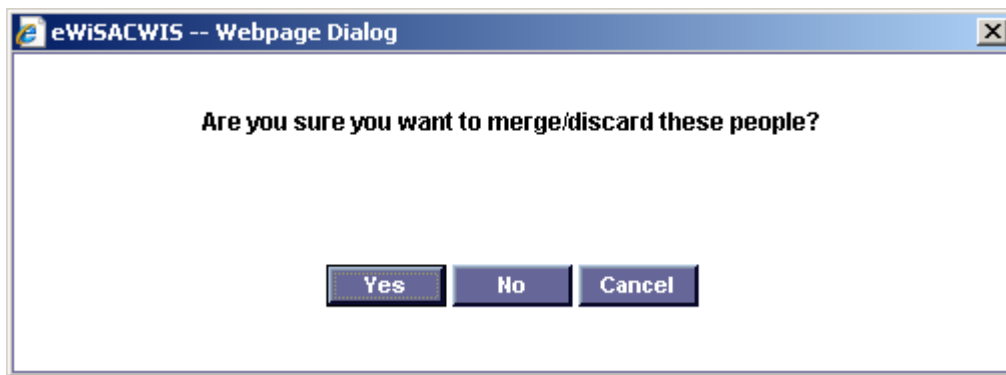
Potential Removal Person(s)

Remove	Name	Person ID	Date Created	Match Criteria	Not a Potential Match	
<input checked="" type="checkbox"/>	Larry Bird	9226091	02/13/2012	Exact match on SSN	<input type="checkbox"/>	Keep

[Manual Search](#)

Save Close

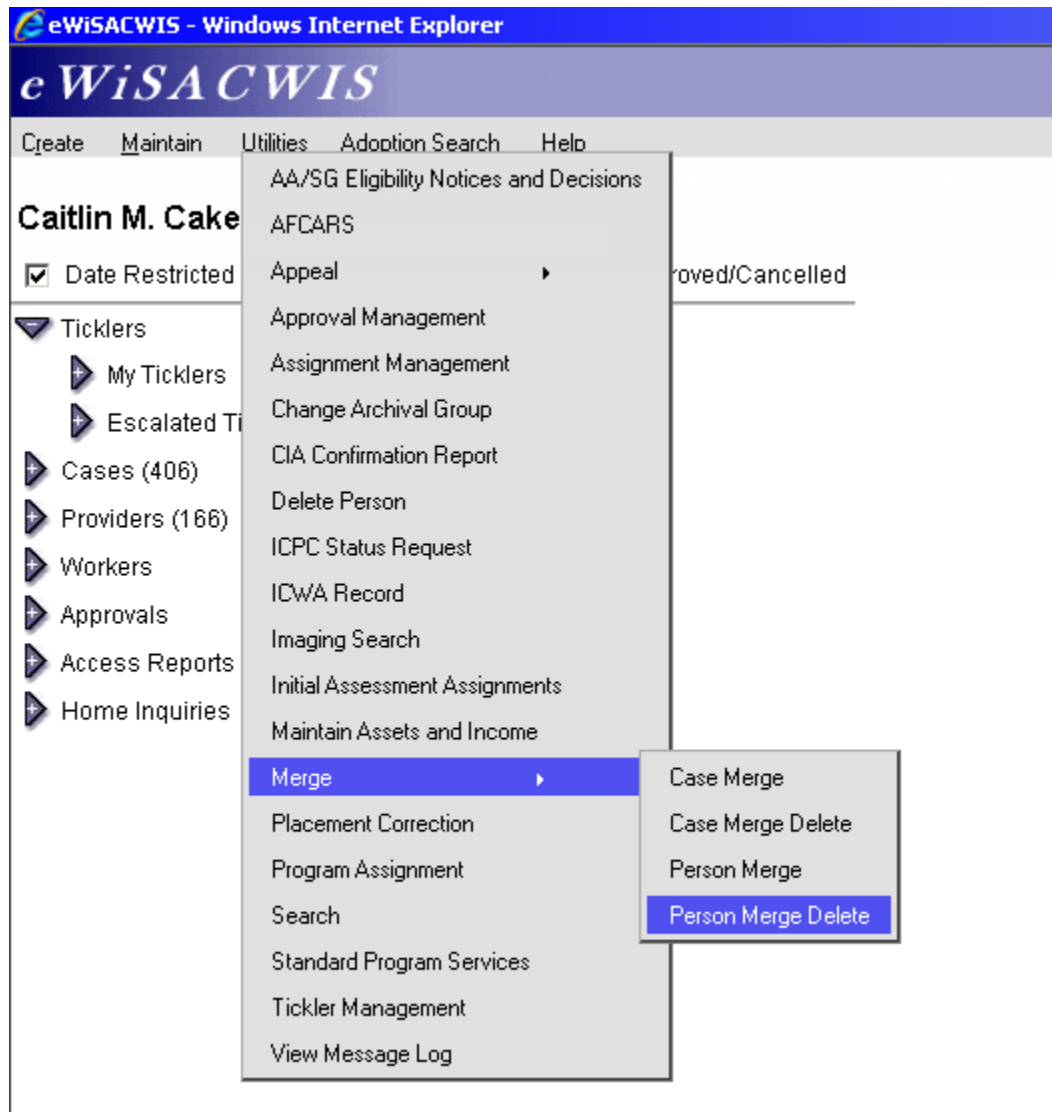
6. The following message will appear. Select 'Yes' to merge.



7. Click the Close button on the 'Potential Duplicate Person' page to return to the 'Home Provider' page.

Person Merge Delete

1. The person merge process can be stopped prior to overnight batch processing. From the desktop, select Utilities > Merge > Person Merge Delete.



- The Person Merge Delete page will identify all participants to be subject to the overnight batch Merge process and all participants who have had a merge request that failed due to system edits. People can be removed from this nightly batch by selecting the 'Delete' checkbox next to the appropriate participant line and selecting 'Save.'

Delete	Submitted By	Date Requested	Remove Person	Keep Person
<input type="checkbox"/>	Cake, Caitlin	12/27/2005	Brenda Brokennose (750096)	April Ash (20839)
<input type="checkbox"/>	Cake, Caitlin	11/10/2004	Charly Mia (9221073)	Mia Mia (9222021)
<input type="checkbox"/>	Cake, Caitlin	12/21/2005	June Stevens (21023)	April Ash (20839)

- The 'Date Requested' column will identify potential problems with a merge. If the date of the requested is older than the current date, the merge did not take place due to a potential problem with the 'Keep' or 'Removed' person. The potential person merge line will stay in the 'Person Merge Delete' group box until the user corrects the problem on line and allows the merge to run through the nightly batch processing – merge.

Delete	Submitted By	Date Requested	Remove Person	Keep Person
<input type="checkbox"/>	Cake, Caitlin	11/10/2004	Charly Mia (9221073)	Mia Mia (9222021)
MERGE REQUEST IGNORED - OPEN EPISODE FOUND				
<input type="checkbox"/>	Cake, Caitlin	03/08/2006	Two Allen (9221607)	Two Birthday (9221516)
MERGE REQUEST IGNORED - OPEN EPISODE FOUND				